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ABSTRACT

A comparative analysis of six UNISIST short training courses was conducted as a basis for recommendations to the UNISIST Steering Committee in regard to future strategies for their education and training programs. Information that emerged from the course evaluations, which varied considerably in comprehensiveness and objectivity, was analyzed. Components and characteristics of the six courses are described with comments about specific courses appearing under each topic. Findings indicate that the factors that make a training course successful are: (1) sound administrative organization and planning; (2) physical environment conducive to teaching and learning; (3) appropriate supportive educational resources; (4) homogeneous student participants who have the necessary occupational background and experience; and (5) adequate preparation time for participants before the courses begin. Based upon the conclusions, recommendations for future programs and matters for further consideration by the UNISIST Ad Hoc committee are presented. A suggested application form, table outlining the characteristics of each course, and a summary of the evaluation method conducted for each course are appended. (JPF)

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A COMPARATIVE ANALYSIS OF UNISIST SHORT COURSES

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INTRODUCTION

1. Aims. The aims of this present paper are two-fold:-

(a) To provide a comparative analysis of the following UNISIST training courses, taking into consideration the UNISIST Guidelines for the Evaluation of Training Courses, Workshops and Seminars: (i) Japan, Kobe (ii) Mexico City (iii) Poland, Katowice (iv) Spain, Madrid (v) U.K. Sheffield/London (vi) U.S.S.R., Moscow.

Details of the courses are set out in Table 1.

(b) To provide a basis for discussions leading to the formulation of recommendations to the UNISIST Steering Committee in regard to future strategy in Education and Training Programmes.

2. The structure of this paper. This paper comprises the following main sections.

(a) An Introduction (paragraphs 1-5)
(b) A comparative analysis of course components and characteristics (paragraphs 6-24)
(c) Factors making for success: some general conclusions (paragraphs 26-31)
(d) Future strategy in education and training programmes (paragraphs 32-46)
(e) Matters for consideration by the Ad hoc Committee (paragraphs 47-61).

3. Evaluation. It is abundantly clear that UNISIST attaches very great importance to the evaluation of its various activities. An evaluation requirement is commonly built into its contracts for courses, etc. It has specially commissioned the Guidelines referred to in 1 (a), above. Furthermore, in the Study of on-going and planned activities in training and education presented to this Ad hoc Committee in January 1975, Evaluation was identified as an economic imperative, rating very high priority, and the whole topic was discussed at some length.

4. Training Courses. In the 1975 study referred to above, short courses were identified as an area of high UNISIST activity. They were also identified as an expensive type of activity, probably involving substantial costs in connection with the direct expenses of the responsible organisation plus travel expenses for participants which, if they came from far afield, could be very heavy. Of the courses mentioned in paragraph 1 above, for example, the

Kobe, Sheffield/London and Poland exercises cost UNISIST $10,000, $27,000, and $28,270 respectively. For this reason it is natural that UNISIST should attach great importance to a comparative analysis of short course evaluations.

5. The UNISIST Guidelines for the Evaluation of Training Courses, Workshops and Seminars. Since this paper is to take account of these Guidelines, it will be useful if the following important terms and concepts from the handbook are stated at the beginning:-

Formative Evaluation. This is evaluation while the course is actually in progress with the object of improving quality and relevance in response to formal and informal feed-back.

Summative Evaluation. This is evaluation in retrospect with the object of assertaining how successful a course has been.

5.1. The following four steps are identified in the Guidelines as making a useful approach to evaluation:-

(a) Evaluating reaction of participants. Completely subjective, but the data itself may be collected in systematic form

(b) Evaluating learning acquired. May be achieved through objective tests and is easiest to carry out if the objective is to impart factual information or teach a skill. A problem is the lack of standardised tests for our field

(c) Evaluating behavioral change. This is more difficult still and needs to be measured by such criteria as subsequent professional advancement or promotion, evaluation by peers, subordinates or superiors

(d) Evaluating of programme results. This implies the existence of objectives and the assessment of how well they have been met.

5.2. None of the evaluations considered in this present report begins to approach in comprehensiveness the full programmes of evaluation implied above. (In the case of behavioral change this is obviously due to the fact that insufficient time has elapsed). Typically the evaluations comprise a report or reports, essentially subjective in character but gaining some degree of objectivity by being based on the results of one or more questionnaires.

5.3. It is of course impossible to prescribe a standardised evaluation procedure appropriate to all circumstances, just as it is impossible to prescribe a completely standardised questionnaire. In any case there are obvious limits to the precision and validity of any evaluation, however comprehensive and technically competent, and Mr Lancaster, in his guidelines issues a salutary warning against the dangers of evaluation "over-kill".

A COMPARATIVE ANALYSIS OF COURSE COMPONENTS AND CHARACTERISTICS

6. As a first step in this comparative analysis the most important components and characteristics of the courses will be considered one at a time (paragraphs 8-24). This will be followed by a summary consideration of the main factors which seem to contribute to success in a course. The analysis is based on information emerging from the 6 evaluations (which vary considerably in comprehensiveness and objectivity) and on the writer's own experience as Director of one of the courses.

7. It is perhaps worth stating at this stage that of the 6 courses the one in Japan was subject to the greatest amount of adverse criticism, the ones in Mexico and Sheffield the least. (The latter benefited greatly from the experience of Katowice and from Professor Lancaster's and Dr. Wersig's evaluations of that course). All had some shortcomings, but all were clearly of benefit to the participants and the point has been well made that the mere bringing together of a professional group from many different cultures, to share and discuss their experience, in itself leads to very valuable benefits.

8. General Course Organisation. This first factor is concerned with the build-up period before the course (i.e. notification of acceptance, preliminary information, advice, etc., for the participants), the arrangements for receiving the participants, etc. and the general day-to-day organisation of the course while it is in progress. It is really a question of efficient administration and management rather than an educational matter, but it is of crucial importance, if the educational environment is to be right and the educational benefits maximised.

8.1. CONACYT receives high praise for the organisation of the Mexico course and many complimentary remarks were also made in the Sheffield evaluation. The Kobe evaluation contained a great deal of criticism on organisational matters. At Katowice problems were created for participants by inadequate advance notice about the course (especially travel arrangements and the precise finishing date), by lack of information about where they were staying, and by a general tendency to "treat these senior people like children". The practical organisation of the Madrid course was described as very good, but a criticism was made that certain participants who were employed in Madrid were required to attend their work and missed parts of the course.

8.2. A successful course calls for a great deal of detailed planning and administration - far too much to be handled single-handed by the busy and senior-level person who normally directs and runs such a course, unless he is seconded from his normal duties. Course organisation and management therefore

needs the undivided attention of an experienced administrator - perhaps on a part-time basis - for several months before the course commences. There should also be adequate secretarial support. These appointments should be a priority claim on the course budget.

9. The Location of the Course. It is difficult to generalise under this heading but location is clearly a matter of very great importance. The isolation of the Hyonga Centre in which the course in Kobe was carried out was thought to be detrimental to the course; on the other hand, the remoteness of the Nestlé Centre site, cut off from the city, in the mountains of Mexico, was thought to be an advantage. The excellent facilities and congenial environment of the Mexican Centre, as compared with an apparently inexperienced management in the Japanese Centre made an additional and important variable which must have influenced the evaluations. The city locations of the Madrid, Sheffield and Moscow courses all appear to have been satisfactory.

10. Accommodation. This was unequivocally praised in the case of Mexico, Sheffield and Katowice and so far as is known there was no complaint in the case of Moscow or Madrid. The fact that in Katowice hotel and lecture theatre were a bus journey apart evoked some mild criticism.

11. Educational Supportive Services. These were assessed very highly in the case of Mexico and Sheffield - particularly, in the latter case, the on-line computer facility and the A/V resources. The Katowice evaluation regretted the lack of a back-up library and was highly critical of the absence of on-line demonstration facilities. In courses where visits of observation were important - e.g. Moscow and Sheffield - it was obviously of great benefit that suitable units were sufficiently near to be included in the programme of visits.

12. The Student Group. If worth-while educational benefits are to accrue, it is of crucial importance that the group should be (a) reasonably homogeneous and (b) adequately qualified to benefit from the course. On these two factors can depend the success or failure of the whole operation. It is therefore disturbing to find that on one or other of these two counts, and in some cases both, most of the courses left a great deal to be desired. The Katowice course members were reported to have "a wide range of pre-existing knowledge" and at least one participant (one evaluator said three) had an entirely inadequate command of the language of instruction. The Madrid evaluations say that problems due to different backgrounds and levels came out repeatedly, and one evaluator said that participants lacked basic knowledge in his subject. The Mexican group, though compatible in language and culture contained fewer high level personnel than planned. The Moscow group though homogeneous in respect of age and culture represented considerable differences

of technical background and were of a lower calibre than the course really called for. The Kobe evaluator refers to marked differences in the level and professional backgrounds of the students. Only in Sheffield was the group completely satisfactory from the point of view of both homogeneity and level of pre-existing knowledge and experience. It is clearly of the greatest importance to diagnose the reasons for these shortcomings and these are set out in paragraphs 13-15, below.

13. Lead-in Time. Inadequate lead-in time appears to be the major single cause of the problems set out above. Consider the following time-tables:-

KOBE	Applications to be in by	30th April
	Selection by	end of May
	Successful candidates informed by	14th June
	Course begins	14th July
MEXICO	Publicity distributed by (There were delays in printing and a postal delay of 33 days to one country was experienced).	end of March
	Application and selection dates not known, but course commenced	10th August
MADRID	Applications to be received by	10th April
	Meeting on applications	15th April
	Course commences	8th June
KATOWICE	Applications to be received by	1st April
	Selection about	15th April
	Successful candidates advised	as soon afterwards as possible
	Course commences	4th August
SHEFFIELD	Course publicity sent out	mid-1974
	Applications to be received by	15th November 1974
	Selection Committee	December 1974
	Successful candidates advised	January-February 1975
	Course commences	6th July 1975

Consider some of the unfortunate consequences which followed from these time-tables - in addition of course to those set out in paragraph 12, above. The Madrid evaluators said both students and teachers needed more time to prepare; the teachers would have found it useful to have particulars of students, their levels, etc., at least a month ahead (surely an elementary and basic educational necessity!). The Kobe evaluator says the selection criteria were not adhered to and participants' backgrounds were not known until the course commenced! The Mexico evaluation reported a disappointingly small number of applicants to choose from, with several important countries unrepresented or under-represented. Compare the Sheffield situation, where the main problem was to decide how to choose from a total of well-qualified applicants which approached 200!

13.1. The grave consequences which follow from inadequate lead-in time are such that it seems worth-while quoting the following pertinent paragraph from the Sheffield report:-

> " It will be seen that there was a long run-up to the Summer School, which enabled a great deal of detailed planning and preparation to take place. There is no question at all that this was a very important factor in the undoubted success of the Summer School. From the point of view of both the organisers and the international participants, advertising a year ahead was none too soon: a deadline for applications 8 or 9 months in advance was necessary if selection was to take place 6 months in advance. The intermediate stages in this progression were beset with problems and heavy with work and correspondence and it would have been very difficult to compress the time-table. Most overseas candidates expect and need substantial notice for undertaking a month's stay overseas, which means that the organisers should be in a position to make their offers not later than 5 or 6 months before the Summer School."

14. Particulars of Candidates. Inadequate lead-in time is probably the main reason for non-homogeneous groups of inappropriate levels of experience and qualification, but two other important reasons are (a) imprecise description in the publicity literature of exactly what qualifications, experience, etc. are required of candidates and (b) the apparent absence of a standard application form in which a candidate has to set out a comprehensive personal and professional profile. As a great deal of work and thought went into planning such a form for Sheffield, which turned out to be very satisfactory, it is included as Appendix 1. to this paper.

15. From all of this, three clear lessons emerge for courses which gain UNISIST support in the future: (a) Ample time must be allowed for general and educational planning and for the process of advertising and selecting groups which are often from countries in many different parts of the world, (b) Precise details of experience and qualifications expected of candidates must be given in the advertising literature - with provision for checking by tests or other means, if in doubt, (c) Candidates should have to apply on a carefully planned and comprehensive application form.

16. Teaching Staff. It will be seen from Table 1 that there were some interesting differences in the staffing of the courses, but with so many other variables it is not possible to draw firm conclusions about an optimum "mix". Sheffield and Moscow both used quite large staffs, all from the same

institution. This gives obvious advantages in terms of a unified approach and ease of advance planning as a team - including the ability to discuss and plan changes of emphasis at a late stage, (as happened before the Sheffield course, in the light of the Katowice evaluation). It also of course carries a danger of institutional bias, but according to the questionnaire responses this was not evident in Sheffield, nor is there any evidence to suggest it applied in the case of Moscow. The Madrid teaching team was quite large, containing at least two members from outside (one French, one from Mexico), but the Katowice team comprised only two: one professor from the U.S.A. and one French information specialist. In the case of Mexico a mixed team of two American professors and two from CONACYT worked very harmoniously and effectively together. On the other hand the mixed Japanese and UNESCO team at Kobe was not deemed a success, largely because of the English language problems of some of the Japanese teachers. On the matter of size there was no report of any teaching team being too large, but one of the Katowice evaluators expressed the opinion that a team of two is too small.

16.1. Quality of teaching received very high praise in Mexico, Katowice and Sheffield. The Madrid responses were not at quite as high a level, but were very satisfactory. English language deficiency appears to have created problems for some of the Japanese teachers at Kobe, as already mentioned; and their coverage and delivery was said to "fall short of the mark". One of the Moscow evaluations refers to the very high calibre of the Russian teaching team.

17. Teaching Methods. Varied, up-to-date teaching methods, appropriate to the subjects being taught, are of key importance to the success of any course. This factor was doubly important in the case of Katowice and Sheffield, for the participants were themselves teachers; this meant that to see and assess different methods in use was an important part of the experience. This element in the Sheffield course turned out in fact to be sufficiently important to warrant some change of emphasis, to give extra prominence to teaching methods: each candidate was enabled to create his own tape-slide presentation and to be filmed delivering a lecturette, with immediate play-back and criticism.

Table 1 shows that in fact most of the courses utilised a wide range of methods. The Mexico evaluation gives high praise to the range of techniques employed and to the highly participative nature of the course. The formative evaluation used at Katowice enabled desirable changes of emphasis towards more discussion and practicals to be made speedily and effectively. At Kobe the insistence on a 3-hour lecture period was adversely criticised and the evaluator thought more visual aids were called for and more of a

workshop approach. In Moscow although the group felt the approach was too theoretical and they would have liked more on-the-job practical work rather than so much visiting, the evaluator felt this was not a fault in the course but a reflection of the inadequate level of the participants themselves. In Madrid it was felt that perhaps there had not been enough consideration of media and materials. The visits were thought to be good but it was felt that too much time was given to practicals. Some students felt there was too little time for informal contact. The wide range of methods used at Sheffield evoked very satisfactory responses but the very full programme was felt to leave little time for reading.

18. Social Activities. An important benefit of an international course is the opportunity to participate in and learn something of the culture and life of the host country. In the case of the Moscow course there was a full, rich and varied programme which was obviously highly appreciated. At Katowice the language barrier was something of a problem, but a social programme was organised of which the only criticism appears to have been its obligatory nature. The Sheffield social programme was highly rated by the participants, particularly the hospitality in the homes of teaching staff. The Kobe course was felt to be unsatisfactory in not allowing free time, or opportunity to partake of Japanese culture.

19. Advance Readings, etc. When possible it is very desirable to prescribe advance preparatory reading: the Katowice observer recommended a period of at least 3 months in advance of the course. The lack of materials in the participants' own countries is often a problem here and if such material has therefore to be sent out by course organisers it needs to be despatched a very long time ahead. (Another reason for a long lead-in period). The Katowice course leader said that another time he would send reading material and course outlines in advance. This was a deficiency in the case of Sheffield, too. At Moscow, on the other hand, lectures were translated into French and distributed before the course began.

19.1. A valuable part of the Moscow course was the distribution to participants of large quantities of photocopies of important articles, etc. This was also the case at Mexico, and at Katowice a book and other literature was distributed to each participant. A literature package of a number of books and copies of important articles was given to each Sheffield course member and though they probably had inadequate opportunity to read them at the time, it was felt that they would be of great value afterwards.

20. Funding. The most straightforward and desirable form of funding is for every selected candidate to be covered in respect of his total expenses (including the very important matter of pocket-money in the local currency). This is rarely feasible and if, in consequence, UNISIST or the course organisers (or both) assume responsibility for raising extra funds it should be realised that this is an extremely complicated and time-consuming burden, as was discovered at Sheffield. Long delays are experienced in dealing with Funds and Foundations, and there are many other uncertainties and frustrations. A much more systematic approach to funding is highly desirable and any action UNISIST can take to codify information about sources of funds and to set in motion in good time the appropriate action to tap them would represent a most beneficial and important step forward.

21. Desirable Length of Course. Only limited information is available on this matter. The evaluator of the 6 weeks' Kobe course felt it was too long and that 3 weeks would have been adequate; on the other hand, no impression was received that at 10 weeks the Moscow course was too long. The Katowice 3 weeks' duration was felt to be about right, as was the Sheffield 4 weeks. As a personal opinion I would say of the latter that it would have been difficult to sustain the intensive level of staff involvement and participation (a vitally important element in the course) longer than 3-4 weeks.

22. Size of Group. It is significant that all available evidence suggests that a relatively small group - not more than say 25-30 - is to be preferred in terms of satisfying educational, personal and "social" objectives.

23. Some Over-all Assessments. Because of the differing scale and comprehensiveness of the 6 evaluations it is not possible to do equal justice to all courses: those evaluations that are most complete, i.e. Katowice and Sheffield, obviously yielded the most information. This is reflected below and should be kept in mind when reading the following summaries.

(i) Mexico. The questionnaire responses were very enthusiastic about all aspects of the course. The Consultant, Professor Wasserman, believes the Mexicans could now put on such a course, without outside specialists, but stresses the importance of the high quality local teachers, the excellence of CONACYT's organisation, the fine setting and supportive accoutrements. He doesn't believe such a combination would be found in any other developing country.

(ii) Katowice. Progress made towards objectives, and the evaluation in general were both favourable. Virtually all participants realised their own objectives completely or almost completely, all would recommend such a

course to their colleagues and virtually all would like to participate in an advanced version of the course. The Director feels that the course was successful in indicating the scope of a curriculum in the Information Science field but that to expect participants to go back and run similar courses for themselves was an unrealistic objective. The observer felt the course achieved its objectives to a remarkable extent.

(iii) Madrid. The present writer's inadequate knowledge of Spanish prevents him from doing full justice to the evaluations, but it is significant that the great majority of participants would recommend colleagues to attend such a course and would themselves like to attend a further, more advanced version. The mixing of Spanish librarian participants with the Iberoamerican information workers was also felt to be an advantage. On the other hand the French teacher on the course doubts if it was adequate for some of the problems the South Americans are involved in, and half of the respondents to the questionnaire felt their objective had been met only partially or incompletely.

(iv) Sheffield. A very high level of satisfaction was recorded with all aspects of the course: very great relevance and value to the participants' own curriculum development and teaching needs was reported; very high scores were also recorded on progress towards satisfying objectives, on quality of instruction, and on the professional value of the course. All participants expected to draw on the course in planning their own educational programmes, 23 out of 24 expected to use it for curriculum development and 24 out of 24 expected to use the information gained in their own teaching. All would recommend a colleague to attend a similar course. There was a general desire for the group to come together again in a few years' time for more advanced work.

23.1. The detailed information which would be necessary for similar assessment of the Moscow course in not available but all indications are that it was successful within the limits imposed by the composition of the group. The Kobe course, while revealing many deficiencies, clearly produced a very valuable result in bringing a regional professional group into contact. The benefits of this are evident in the expressed intention of that group to keep in touch via a news-letter.

24. Follow-up, Summative Evaluation. It will be interesting indeed, and very valuable, to gain from participants further information about the value of the courses, from the viewpoint of a year or so after their completion. Assessments of the courses' value to their teaching, to their curriculum development, to their own educational programmes in general, will be more meaningful at that stage than when under the immediate stimulation (and perhaps euphoria?) of

actual participation in the course.

25. Follow-up and Feedback. Under this heading the Kobe evaluation mentions the desirability of maintaining the close ties developed between participants and with UNISIST. A quarterly newsletter has been started for this purpose and such publications may well be appropriate after other, similar courses, acting also as a link and liaison with the UNISIST Secretariat.

25.1. In the case of several courses, members expressed a desire to come together again after a period of time, for more advanced study. To encourage the pursuit of greater depth of knowledge in this way is clearly very desirable; on the other hand it might be argued that these people have already had one experience of a UNISIST course and if they are selected a second time it would be at the expense of people who have had no such experience at all.

FACTORS MAKING FOR SUCCESS: SOME GENERAL CONCLUSIONS

26. The analysis of course components and characteristics (paragraphs 6-23, above) makes it clear that far too many variables are involved for it to be possible to draw precise and definite conclusions. However, certain key factors emerge so clearly that they can legitimately be identified as being of importance for the success of a course. These are set out in paragraphs 27-32, below.

27. Sound Organisation and Planning. Many of the faults identified in the evaluations are the consequence of weak organisation and administration at the most fundamental levels. This may be due to over-hasty preparations, to an unprofessional approach to administrative matters, to special local problems or to a variety of other reasons. It underlines the need for UNISIST to be quite sure of the credentials and reputations of the individuals, organisations and institutions concerned with presenting a course. As experience is gained it should become apparent which individuals, which bodies, may be confidently entrusted with funds for this purpose and UNISIST should constantly be seeking to identify individuals and bodies of high achievement who are jealous of their reputations, and therefore highly motivated to make a success of any undertaking to which they commit themselves. The most important single factor in the success of a course is probably in fact the initial choice of those with whom UNISIST is to be associated in its running.

28. Physical Environment. For maximum educational benefits it is essential that the physical environment should also be right. This means an

agreeable location at a suitable season of the year, adequate accommodation, the availability of cultural, social and recreational facilities and opportunities, and an appropriate concern at all times for the comfort and well-being of course participants who may be many thousands of miles from home, in an unfamiliar environment and culture.

29. Educational Environment. The importance of appropriate plant, equipment, library back-up and other supportive resources emerges clearly from the evaluations. So does the necessity, in the case of some types of course, for conveniently situated units for visits of observation and practical experience. UNISIST should be wary of placing funds unless these conditions can be met.

30. The Course Participants. It is important that the number of participants should be reasonably small - not more than 25-30. But this is not all: most of the courses fell down - sometimes badly - on the quite fundamental matter of achieving a homogeneous group at the desired level. Two main reasons have been identified for this: (a) inadequate lead-in time and (b) Imprecise description of the qualifications, experience etc.required of participants, and no systematic requirement for a full profile or curriculum vitae of each candidate. The latter provides knowledge and information which is absolutely essential for both selectors and teachers on the course.

30.1. It is therefore recommended that UNISIST should not support courses unless the time-tabling permits (a) full-scale advertising and dissemination of information taking place approximately a year ahead, thereby ensuring maximum and widespread knowledge of the course and a large field of applicants and (b) closing dates and selection procedures which will ensure that successful candidates have a minimum of four months' and preferably five or six months' notice of their selection.

30.2. It is further recommended that all prospectuses and advertising materials should be required to state entrance requirements with a high degree of specificity and likewise the course content and objectives. A comprehensive application form, perhaps along the lines of Appendix 1, should always be used.

30.3. Great importance is attached to the recommendations in 30.1 and 30.2, above. They are central to the key objective of getting the right people onto the right courses: to bring together a non-homogeneous group, at a level

inappropriate to the course and its objectives is both inefficient and wasteful of UNISIST's resources.

31. Advance Readings, Course Outlines, etc. Though known to be difficult to achieve it is strongly recommended that the most important reading materials, book lists and course outlines should be sent out well in advance. This is of course another reason for finalising selection well before the course commences.

32. General Appreciation of the Guidelines. The Guidelines have proved invaluable in presenting and structuring the above comparative analysis. They should be carefully studied by all concerned with the management, presentation and teaching of short courses. It would be particularly useful, too, if a short and concise version could be produced for day to day guidance and operation - omitting much of the background material, which would always be available, if needed, in the main work.

FUTURE STRATEGY IN EDUCATION AND TRAINING PROGRAMMES

33. This paper has so far been devoted to quite detailed consideration of one particular and very important element in UNISIST's Education and Training programme, namely, short courses. With the knowledge now available about these courses, it is possible to see their role in general Education and Training strategy much more clearly than has been the case before.

34. It will be useful to reproduce at this point the elements of strategy identified and approved at last year's Ad hoc Committee Meeting (as set out in Development of Manpower Resources for the Planning and Operation of Information Systems: The Training and Education Programme of UNISIST, p2-3, SC/UNISIST/ST.COM. II/10).

" Elements of Strategy

(a) The Ad hoc Committee on Education and Training approved the strategy adopted so far by the Secretariat to implement a number of activities emphasizing evaluation in order to learn from experience, and to use funds as "seed money" with contributions from other sponsors for activities which could have a "multiplier" effect.

(b) The Committee accepted the general principle that UNISIST activities should have the long-term aim of building up in each country, or in small homogeneous regions, the facilities needed for the professional education and training of scientists and engineers in information science and technology. A high proportion of available resources should be devoted to this purpose. In the short term, however, and in the absence of national educational capabilities, developing countries needed to have access to educational facilities in developed countries through basic (professional) courses and short courses(for adapting, updating, retraining and specializing) which dealt with precisely-defined subjects and were aimed at specific audiences.

(c) The Committee defined the broad objective, already pursued in existing activities, as being to promote education for tomorrow, not yesterday, i.e. to enable developing countries to play an effective part in the development, interconnection and utilization of modern information systems and networks. It recognized information science as a complex multidisciplinary subject ranging from computing and telecommunications through cybernetics to psychology, logics and techniques of classification and indexing. Education and training had to be planned so as to respond to the diversified needs for specialized skills.

(d) One urgent short-term need was for the collection and dissemination of information on a wide range of topics - the content of courses, their regulations and requirements, teaching materials, facilities for in-service training, sources of fellowships, the status of information scientists, etc. Another short-term need of great urgency was the harmonization within the UNISIST programme of assistance programmes of international agencies concerned with the education and training in scientific and technical information (see also section VI).

These main elements of strategy pervaded the whole thinking of the Committee and influenced its conclusions and recommendations. "

35. It is also worth-while to state at this point the basic assumption that the general objective of UNISIST's education and training activities continues to be to make the maximum possible contribution to the production of the world's specialised information manpower requirements, within the limitations imposed by available resources. It is also an assumption that first priority will continue to be given to systems interconnection and assistance to developing countries.

36. So far as short courses are concerned UNISIST has already achieved considerable success in all aspects of 34 (a) above. Its short course expenditure has indeed been "seed money" and there have been notable "contributions from other sponsors". For example, the course of which the present writer has most knowledge - that at Sheffield - attracted substantial contributions from the British Council, the [American] Council on Library Resources, the University of Sheffield, O.A.S., and several other organisations which sponsored part or all of the expenses of individual students. So far as "multiplier effect" is concerned, it seems clear that participants on all the courses - particularly those aimed at teachers - would go back to spread and disseminate as well as to utilise the information which they gained. Furthermore, the geographical spread of the courses is commendably wide and so, too, is the variety of languages of instruction.

37. Future Short-Course Policy. After such a relatively small number of short courses it is probably too early to question whether expenditure on short courses continues to justify high priority in the allocation of UNISIST resources. In the view of the present writer, the answer to such a question

would be an unqualified "Yes" - in general terms. What is not so clear cut, however, is the nature of the need: what sort of courses, at what sort of level, for what sort of target group, with what sort of objectives, and in which locations. These are matters which the Ad hoc Committee might usefully consider, perhaps under the heads set out below.

38. Target Groups. In my Study of on-going and planned activities in training and education presented last year to the Ad hoc Committee I emphasised the value of a carefully planned network of educational and training institutions, on a world-wide basis (See paragraph 34 b, above). I also stated that building up a cadre of full-time teachers concerned with full-scale courses in information/documentation/librarianship is arguably the most important consideration of all in achieving UNISIST's educational and training objectives, and that it is an activity with a very high "multiplier" effect. The Sheffield and Katowice experience and evaluations have confirmed the writer in this view and courses for Teachers or potential teachers are put forward as meriting first priority. Very important, too, if for somewhat different reasons, are courses for Managers of Information Systems, and it is suggested that this group also merits very high priority.

39. Level of Course. The planned level for all courses considered in this paper was at least "professional", i.e. not for "aide" or "para-professional" level staff. This would seem to be the right policy. What is not so clear, however, is whether future emphasis should be on courses which are advanced, intermediate or elementary in their treatment. This is one manifestation of the more general problem of whether or not to place greatest emphasis on "leadership" level training. I would suggest that for the present the answer should be "Yes" - to concentrate attention and resources at leadership level and to place principal emphasis on advanced training, though not to the entire exclusion of other levels.

40. Content of Courses. In a broad sense information work can be thought of as comprising three main areas of study: Management, Information Retrieval and Information Resources (this latter includes both documentary and non-documentary resources). Whichever area or combination of areas is covered by a course it should be expected to bring out in some way, at some stage, the international element and dimension which is central to UNISIST's objectives: for example the concept of UNISIST itself, of NATIS, AGRIS, INIS, etc. As for the specific subject matter of courses, it is suggested that too broad an approach may result in superficiality: it was said, for example, that the Madrid course tried to cover too wide a spectrum. Management appears able to stand on its own as a viable topic: so, too, does Information Retrieval, though this can be meaningfully combined with the study of Information Resources. Cutting across

such a self-contained approach would be the type of topic covered at Kobe - Information Networking and Systems Interconnection. This theme is obviously a very important one and consideration might be given to trying it out elsewhere, with a carefully selected participant group.

41. It might of course be questioned whether or not any course involving advanced technology - e.g. computerised systems - is relevant to the real and immediate needs of a developing country until a really sound general infrastructure exists. On this specific issue and, indeed, the whole matter of course content, the Ad hoc Committee members are themselves very well qualified to comment and therefore no further suggestions of a specific character will be made in this paper.

42. Location and Language. From Table 1 it will be clear that UNISIST is trying out a variety of locations for short courses and is also systematically supporting different languages of instruction - e.g. the Sheffield course (English) is to be followed by similar courses presented in French and in Spanish. The question will soon arise whether to continue experimentally with a whole range of locations or to build on proved strength - i.e. to concentrate on particular locations where successful courses have been held, as recommended by Professor Wasserman in his Mexican evaluation.

42.1. At a time when short course strategy in general is being reviewed it might also be relevant to re-examine UNISIST's relationship with the annual Moscow course: there could be a prima facie case for considering that its industrial orientation and objectives place it firmly within the exclusive province of UNIDO.

43. UNISIST now has enough experience of short courses to be able to trust its own sense of direction for the future. It is therefore inadvisable to respond to specific short course proposals from individual member states, even if backed by financial support, unless the proposed activities are in clear accordance with UNISIST's own purposes and priorities.

44. Long-term Objectives. In paragraph 54(b) we are reminded of the long-term aim of building up in each country or region permanent educational facilities for the presentation of full-scale basic courses. An approach to this might be for UNISIST to identify which institutions in which countries seem best fitted for such a role, and it is suggested that UNISIST should now grasp the nettle of selecting the localities and institutions which are to receive such priority treatment.

45. A principal contribution to the long-term strategic objective of building up these institutions is the advanced training of teaching staff. Individuals with the appropriate potential should be identified - perhaps by assessment of their performance on short courses - and they should then be sent to high-level institutions for advanced training at Master's or Doctor's degree level. UNISIST Fellowships to support this sort of training are recommended as an investment with an important long-term return.

46. A prerequisite for placing the right people in the right institutions for the right sort of training is full information about the degrees and qualifications available in different parts of the world - a subject which already features on the Ad hoc Committee's agenda. Other short term needs which have already been identified as being of high importance are quoted in paragraph 34(d), above. These are all concerned with the collection and dissemination of information and the present writer would reaffirm that this type of activity - whether via a clearing house or some other mechanism(s) is of very high priority indeed.

Matters for Consideration by the Ad hoc Committee

47. The preceding paragraphs have looked closely at aspects of short course strategy and also at certain other forms of education and training activity which are in competition with short courses for UNISIST resources. At this point it may be useful to list the more important of these general and specific issues, for closer consideration by the Ad hoc Committee. They are set out in paragraphs 48-61, below.

48. Is it still desirable to keep up the present quite high level of short course activity, or has the time come to divert more resources towards other types of education and training activity? Whatever the answer to this question it is important to come to decisions about certain issues raised by the analysis of short course evaluations. These are set out in paragraphs 49-58, below.

49. Evaluation. First of all, should evaluation according to Professor Lancaster's guidelines be a requirement of all future courses? Some of the evaluations considered were skimpy, inadequate and very subjective.

50. Target Group (see paragraph 38). Should teachers and managers have top priority for future short courses, particularly in view of their high multiplier and catalytic potential?

51. Geographical Location (see paragraph 42). Are there any regions or countries which should have priority in mounting future courses? Should the

policy be to repeat courses at locations which have proved successful in the past, rather than to experiment with fresh locations?

52. Language of Instruction (see paragraph 42). Is the present policy of concentrating on English, French and Spanish working out satisfactorily? And are there any special problems needing attention in the case of courses which rely on simultaneous translation (e.g. Mexico, in part; and Moscow)?

53. The Organising Institution (see paragraphs 8-11, 27-29). This report has identified the characteristics required of a successful organising institution: the right sort of location, good administration, proved educational achievement and experience, strong educational supportive services, etc. Are there any ways in which such characteristics can be checked and assessed, prior to UNISIST agreeing to supporting a course?

54. Level of Future Courses (see paragraph 39). What level of treatment should receive priority in future courses: Advanced (leadership level), intermediate, introductory? To some extent this depends on course content: a new subject may need introductory or elementary treatment even if the target group comprise senior and experienced people.

55. Content of Future Courses (see paragraphs 40-41). What topics should qualify for high priority in future courses? Should all UNISIST courses be required to devote some attention at least to the international element? Are courses involving computers or other advanced technology appropriate for developing country audiences? Does the content of the Moscow course (paragraph 42.1) mean it is more appropriately covered by UNIDO than UNISIST.

56. A Homogeneous Student Group at the Right Level of Experience etc. (see paragraphs 12-15). Paragraphs 30-30.3 set out extremely important findings and recommendations in respect of lead-in time, the detailed statement of course requirements and the use of a comprehensive application form. Does the Committee believe it is (a) desirable and (b) feasible to act on these recommendations?

57. Follow-up, Feedback. In paragraphs 24-25 certain ideas for follow-up and feed-back are put forward. Are there any further means of securing these very desirable and more permanent links with former UNISIST course members?

58. Funding (see paragraph 20). How can UNISIST best achieve the objective - important to all future planning - of systematising information about and access to sources of funds for education and training purposes?

59. Long-term Objectives. (see paragraph 44). Can UNISIST now begin to identify the actual countries and educational institutions in which it will carry out its policy of strengthening, or helping to create, facilities for presenting full-scale, basic courses?

60. Fellowships (see paragraph 45). Is it feasible to create a Fellowships fund for the advanced training of staff for the above institutions?

61. Paragraph 34(d) identifies the collection and dissemination of information on a wide range of topics as an urgent short-term need. Are there any further steps which the Ad hoc Committee would recommend to bring this about?

ADVANCED INFORMATION WORK

A UNISIST/FID/IFLA International Summer School
for Teachers and Workers in the Information Field.

6th July - 1st August, 1975
Sheffield, London, United Kingdom

Presented by the
University of Sheffield
Postgraduate School of
Librarianship and Information
Science

In collaboration with the United Nations Educational, Scientific and Cultural Organization (Unesco), the International Federation for Documentation (FID) and The International Federation of Library Associations (IFLA)

"A P P L I C A T I O N F O R M"

Explanatory Notes

1. Please complete Section 8 in BLACK INK in your OWN HANDWRITING. Complete all other sections by TYPEWRITER

2. This Application Form will be used by the Selection Committee, and in view of the large number of applications to be considered, it is in your interest to complete the form as clearly as possible. Should you require additional space, please do no hesitate to use an additional sheet of paper.

3. Your referees, who should be well acquainted with your work, and who should not be related to you, will not be approached, unless you have been short-listed.

4. If you are short-listed, you may be requested to produce evidence of knowledge of English.

5. If you are offered a place in the Summer School, and you accept, you will then be asked for photographs and you will also be required to complete and sign a Registration Form. You will then also be considered for the award of one of the Fellowships expected to be made available by Unesco or other sources.

6. Return the completed Application Form to :

   . 1975 Sheffield Summer School,
   Postgraduate School of Librarianship and Information Science,
   University of Sheffield,
   SHEFFIELD S 10 2 TN
   England

   so as to reach the School before 15th October 1974.

1. Full name (CAPITAL LETTERS)
(Please check that names as on passport are entered in this space)

Surname	Forenames

2. Date of birth	Male/Female	Married/Single	Nationality	Any special dietary requirements

3. Home address

4. Educational Record (from age of 18 years)

Educational Institution	Location	Years attended		*Degrees, diplomas and certificates (if any) of subjects studied for degree or diploma	Special fields of study
		From	To		

* state also marks obtained and class of degree obtained

5. Employment Record (Please show most recent posts first)

	Dates of Service	Name and address of employer	Type of organisation	Brief description of duties indicating candidate's personal responsibility
Present Post				
Previous Post				
Previous Post				

6. Knowledge of English

Speaking	Reading	Writing

Use scale: Excellent=1, very good=2, good=3, mediocre=4, poor=5

Computer experience (if any)

7. Publications

attach additional sheet, if required

8. Please state briefly your reasons for wishing to attend this Summer School:-

9. Referees
(Please give the name and full address of one person to whom reference may be made for a confidential report on your academic qualifications, and of another person for a confidential report on your professional experience in library/information work).

(i) Academic referee:

(ii) Professional referee:

10. Fees and Expenses

If you are offered a place on the Summer School, will you be able to accept even if you do <u>not</u> obtain financial support from your government, Unesco, or some other source?

YES/NO

11. Declaration

I, the undersigned, declare that the information provided above is to be the best of my knowledge true and complete, and I undertake to submit, if requested to do so, any documents in support of the above.

Signature _____

Date _____

TABLE 1
COURSE CHARACTERISTICS.(SHEET 1)

LOCATION	DURATION OF COURSE	TARGET GROUP	NATURE/CONTENT OF COURSE	LEVEL OF COURSE	QUALIFICATIONS REQUIRED FOR ENTRY
JAPAN - KOBE	6 weeks	Those involved with networking and sci/tech. info.systems at national level in S.E.Asia	Information networking & systems interconnection in S.E. Asia	Introductory	Proficiency in English. High technical background National level involvement with info. systems
MEXICO - MEXICO CITY	13 days	Directors of Information Systems in Latin-America	Management principles and techniques	Basic orientation in principles & techniques	University degree. Administrative responsibilities
POLAND - KATOWICE	3 weeks	Educators or potential educators from developing countries	Information Retrieval & Information Retrieval Systems	Introductory	Preference to teachers or potential teachers. Proficiency in English
SPAIN - MADRID	3 weeks	Iberoamerican specialists in scientific and tech. information	Scientific and technical Information:User Needs, Management techniques, Scientific Information Systems	Introductory	Univ. degree pref. in sci. and tech. Practical experience in Inform. & Documentation Work. Knowledge of Spanish.
U.K. - SHEFFIELD & LONDON	4 weeks	Educators or Educational Administrators from Developing Countries	Advanced Information Work: Management, Retrieval Languages,Computer-based Information Systems	Advanced	Good operational experience Good formal academic qualifications. Professional qualification at MLS level.
U.S.S.R. - MOSCOW	10 weeks	Senior industrial information scientists or those deisgnated for such posts, from French-speaking Africa	Industrial Information and documentation	Advanced	Not known

TABLE 1
COURSE CHARACTERISTICS. (SHEET 2)

LANGUAGE OF INSTRUCTION	NO. OF PARTICIPANTS	SPONSORS (with UNISIST)	TEACHING STAFF	TEACHING METHODS
English and Japanese translated into English	18 - from 9 different countries	Govt. of Japan: Overseas Tech.Coop. Agency Jap.Nat.Comm. for UNESCO Jap.Documentation Soc. Kobe University	3 UNESCO + a team of Japanese	Information limited-incomplete 3 hour lectures Visits Slides and films mentioned in prospectus
Spanish and English translated into Spanish	21 - from 10 different countries	CONACYT	2 Mexican Professors 2 from U.S.A.	Group discussions, Play roles, Lectures etc., highly participative
English	19	Polish Ministry of Science, Technology and Higher Education and Nat. Centre of Sci., Tech. & Economic Info.	1 U.S. Professor 1 French Professor	Lectures, slides, films, transparencies, discussion periods, practical exercises
Spanish	19 Spanish and 9 Iberoamerican	OEI, Spanish National Commission for UNESCO, National Libs.Commission, Centre for Information & Documentation.	8-10 teachers of whom 1 French and 1 from CONACYT Others presumably Spanish	Not clear
English	24 - from 22 different countries	FID/ET, IFLA	8 staff members of Univ. of Sheffield Postgrad. School of Librarianship and Information Science	Lectures, seminars, tutorials, practical work, "hands-on" experience of on-line working, case study, management game, slides, tape-slide, transparencies, films, exhibitions, Visits
Russian translated into French	18 - from 14 different countries	UNIDO, USSR State Committee for External Relations, VINITI	Team of USSR specialists in scientific, technical and industrial information	Lectures, Practical exercises, discussion, visits, presenting papers to class

EVALUATION

	INDEPENDENT OBSERVER(S)	PURPOSE: SUMMATIVE OR FORMATIVE	VIEWPOINT: STUDENT, TEACHER, PROGRAMME PLANNER	OBJECT OF EVALUATION	FORM OF EVALUATION	SUBJECTIVE OR OBJECTIVE	CHARACTERISTIC MEASURED	STAGE OF EVALUATION
JAPAN - KOBE	No	Both (Evaluation forms deemed unsatisfactory in each case)	Teacher/ Consultant	Not clear - evaluation is in form of Report on course as a whole	Report based on Informal evaluation - (discussions, etc.) and on Formal evaluations (Questionnaires)	Apparently subjective	Not clear	On-going and terminal
MEXICO - MEXICO CITY	No	Both	Students and teachers	Student, Teacher, and Programme Performance	Two Reports based on questionnaires, also informal	Subjective	Reaction, Programme results	On-going and terminal
POLAND - KATOWICE	Yes,-Dr.Wersig for 1 week	Both	Students and teachers	Student, Teacher, and Programme Performance	Report by Course Director,based on comprehensive questionnaire and Report by Observer	Subjective plus objective assessment of 'learning'	Reaction, Learning, Programme results	On-going and terminal
SPAIN - MADRID	No	Both -followed Polish model	Students and teachers	Programme Performance, Teacher Performance	Report based on substantial questionnaires	Subjective	Reaction, Programme results	On-going and terminal
U.K. - SHEFFIELD & LONDON	Yes,Professor Meyriat - 1 week. Austrian participant/ observer for whole course	Both -formal summative and informal formative	Students and programme planners	Student, Teacher, and Programme Performance	Report based on informal discussions and very comprehensive questionnaires	Subjective	Reaction, Programme results	On-going at informal level, Terminal at formal level.
USSR - MOSCOW	UNIDO rep. for 4 days Mr.Tocatlian of UNISIST	Both	Programme planner	Programme performance, student performance	Reports by Mr.Tocatlian and Russian Director of course	Subjective	Reaction, Programme results, Student performance (via Projects)	Apparently on-going at informal level. Plus terminal